

Joint Archives Board

8 November 2023

Joint Archives Service Development Plan (2021-26) Monitoring Report

For Decision

Portfolio Holder: Cllr L Beddow, Culture and Communities
Cllr Andy Martin, Customer, Communications and Culture,
BCP Council

Local Councillor(s): All

Executive Director: J Sellgren, Executive Director of Place

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Report Status: Public

Brief Summary:

This report provides an update to the Joint Archives Board on the current and future work of the Joint Archives Service (JAS). The Service Development Plan appended to this report carries detailed information on the service's activities and the report will highlight work undertaken against the JAS's key objectives. Since the last report, the service has:

- Continued to expand the range and type of digital preservation activities including leading the now 21-member local government consortium.
- Raised £57k towards the cataloguing of the Thomas Hardy archive;
- Taken a lead role in a national project to examine the status of the records of adopted and care-experienced people – due to complete in March 2024;
- Enrolled two members of staff in the new Level 7 Apprenticeship in Archives and Records.
- Pursued plans for a revised capital project to address its long-standing accommodation challenges (see accompanying report).

The JAS priorities for 2021-26 are:

- Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve, conserve and promote access to them to optimum effect
- Design and deliver digital preservation services across both authority areas
- Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities
- Engage a wide variety of audiences with digital and physical resources and events, recognising barriers to involvement and working actively to dismantle these
- Encourage and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work
- Develop and maintain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver positive outcomes and mutual benefits to all parties
- Efficiently manage and enhance the DHC building including the provision of sufficient long-term archival storage space, so increasing value for money for customers, collections and staff

Recommendations:

It is recommended that the Board:

1. Endorses the implementation of the 2021-2026 service plan appended to this report as demonstrating the quality, variety and value for money provided by the JAS;
2. Supports the JAS's ongoing work to ensure the safe and effective transfer of appropriate physical and digital records from both BCP and Dorset Councils to ensure the preservation of the corporate memory and to deliver council efficiencies.
3. Approves a two-week closure period for the JAS in January 2024 to allow for important collections-related work to take place.

Reason for Recommendation:

Effective oversight of the regular service delivery element of the service plan by the Joint Archives Board is required under the terms of the Inter-Authority Agreement on Archives, 2022

1. Introduction

- 1.1 The Joint Archives Service (JAS) is Accredited by [The National Archives](#) and holds the corporate archives of its funding councils and their predecessor bodies as well as thousands of individual physical and digital collections dating from 965AD which collectively make up the written heritage and memory of Bournemouth, Christchurch, Dorset and Poole. In addition, DHC holds Public Records on behalf of HM Government.

The JAS provides services to the public in three principal ways:

- On-site - public access at Dorset History Centre (DHC);
- Off-site - learning and community engagement;

- Online – a large and growing market for web-based resources, particularly given the JAS's relationship with Ancestry.co.uk, its online catalogue and digital engagement work.

2. Context and challenges

- 2.1 A full-service review was undertaken in 2020 and the subsequent [consultancy report](#) published in March 2021. The report was approved by the Joint Archives Advisory Board (JAAB) at its April 2021 meeting and a new five year (2021-26) service plan was written. This draws upon some of the key findings of the consultants' report, particularly in relation to the efficient acquisition of corporate records and the growth of digital services. The service plan has also adopted and integrated the key messages of the national strategy for archives developed by The National Archives (TNA) *Archives Unlocked* (2020), namely Trust, Enrichment and Openness.¹
- 2.2 The two most important priorities for the service that emerged from the report are:
- **Accommodation:** the continuing search for an affordable and long-term solution for the future additional collections storage required by the service. Opened in 1991, DHC is now approaching full capacity with 2,500 empty box spaces (of a total 56,000). This has developed into a revised capital project plan (see accompanying report).
 - **BCP Council records:** the Joint Archives Service wishes to deliver on one of its key priorities which is to be the corporate memory of both funding councils. There are significant challenges associated with the transfer of relevant archival material and the service is keen to find ways of ensuring that this happens in both physical and digital formats.
- 2.3 In addition to the above, the JAS will be applying for re-Accreditation. This process, overseen by The National Archives takes place every six years and is critical to the service's status as a Place of Deposit for Public Records and as a standards-compliant public service facility..

3. Service Structure and Capacity

- 3.1 The service's core Archives capacity is currently 12.07 fte posts. This will reduce by around at least 1.2 fte by May 2024 however.
- 3.2 The service is facing change in the near future. The long-standing Office Manager will be retiring in May. This role deals with all premises-related matters, finance and administration. Presently, we are considering how these functions may be delivered. One scenario is a move towards the 'Efficient Property Services' model whereby most buildings-related functions are managed by the central Facilities team. In addition, we need to fill the role of Archivist (Digital Preservation) on a fixed term basis when the current incumbent goes on maternity leave in February 2023.

¹ <https://nationalarchives.gov.uk/archives-sector/projects-and-programmes/strategic-vision-for-archives/strategic-priorities/>

Two members of the public service team (along with a member of the Records Management service) will commence Level 7 (Masters-equivalent) apprenticeships in Archives and Records from October 2023. This is excellent news in terms of staff professional development and training. It will however put occasional pressure on the public service team due to the weekly study day that each candidate will require.

4. **Public Services**

- 4.1 2023 has been a busy year for the Public Service team, building upon our new methods of working that had begun during 2022. The booking system for customers wishing to access original documents has become more embedded as part of our normal working practice, whilst drop-in visitors accessing the library, computers or microfilm facilities continue as well.
- 4.2 Staff time has partially been utilised to work on cataloguing projects, preparing new website media, ongoing work listing probate records, and commencing a stock audit of the library.
- 4.3 The absence of a Reprographics Assistant between June and October 2023 following the retirement of the previous incumbent meant that two members of the public service team took responsibility for processing orders, to ensure that business continued as usual. This therefore restricted the opportunities to undertake other jobs during this period.
- 4.4 The period October 2022- September 2023 saw a total of 1,527 visitors (an increase of 45% on the previous year). There were a total of 903 pre-booked visitors in this period, or just under 60% of our overall total of visitors, a figure slightly lower than the previous year, but indicative of the increase in drop-in visitors utilising all elements of the service.
- 4.5 The recently catalogued collections continue to be popular, with D-BKL(Bankes) and NG-HH/CMR (Herrison Hospital) continuing to be amongst our most popular. Interest in the Thomas Hardy archive continues to be strong, and this is the most requested un-catalogued collection. In addition, demand for D-FRK (Dame Elisabeth Frink archive) has been ongoing through the year, as work ahead of an exhibition at Dorset Museum, coupled with both media and auctioneer interest have driven demand for the collection.
- 4.6 Remote enquiries have remained strong, with a total of 2,245 written enquiries.
- 4.7 During the 12 month period, we received slightly fewer reprographics orders than in the previous year, drawing in £6559.50 (down from £7,305.20 in 2021/2022). The average value of an order has therefore fallen to £28.27, down from £30.57.
- 4.8 The research service has proven to be steady, but the overall numbers have dropped from the previous period, with a total of 30 orders received in the year, a reduction from the 50 of the previous year.

- 4.9 The figures reported for remote enquiries, reprographics orders, and the research service, when combined with the increase in overall visitor numbers to the building, suggests that following the uncertainty of the pandemic period, more people have now returned to DHC to do their own research rather than trying to do work remotely.
- 4.10 Volunteers have averaged 135.7 hours on-site per month in the last year, contributing a total of 1,627.95 hours at DHC in this time. This is figure approximately double that of the hours recorded in 2021/2022. In addition, remote volunteers contributed over 300 hours of time, meaning that volunteers have contributed 1,934.27 hours of time in the year, over 650 extra hours compared to the previous period. Volunteering is an essential component of DHC's capacity. It is something the service carefully nurtures. Volunteer capacity will increase with the commencement of the Hardy archive project in early 2024.
- 4.11 We have published a total of 69 blogs in the 12-month period, fewer than in the previous year. The number of tweets has increased from 286 last year to 362 this year, helped by regular tweets about the Thomas Hardy fundraiser through the course of the year. Subscribers to the newsletter remain at around 10,000.
- 4.12 The service has contributed to two national television programmes aired this year. The Channel Five series on the Black Death featured an expert member of DHC staff speaking with presenter, Dan Snow, about a significant collection of manor court rolls charting the progress of the epidemic from its port of entry in Weymouth. The BBC *Fake or Fortune* series recently featured an episode on an Elisabeth Frink sculpture. The archive held at DHC was used extensively for the research facilitated by DHC staff with the final programme featuring items from the archive.

5. Museums Advisor for BCP and Dorset Councils²

- 5.1 In October, South-West Museum Development (SWMD), which is hosted by Bristol City Council, confirmed that they have been awarded a grant by Arts Council England for 2024-2026. This funding will be used to continue the regional museum development programme, which includes training and skills development, a programme of grant investment and a framework of local Museum Development Officers across the South-West Area. From 2024 the programme will be extended to include Hampshire Solent (Hampshire, Portsmouth, Southampton and the Isle of Wight) reflecting the Arts Council England's South-West Area. This funding makes a vital contribution to the Dorset & BCP Museums Advisor post.
- 5.2 The Museums Advisor has worked collaboratively to deliver SWMD initiatives and projects across the Dorset and BCP area during 2023. This has encompassed the lottery funded *Travelling Together* project, the

² This role is not part of the JAS funding model, but similarly covers both council areas. It is funded by BCP and Dorset Councils along with South-West Museum Development. Museums development and archives are closely linked and mutually supportive.

Organisational Health Check Programme and the South-West Visitor Insights Programme. The latter has been particularly successful and is essentially a bespoke audience evaluation programme which helps museums to understand who their visitors are and what they think about their museum visit and experience. The data generated from the programme provides incredibly valuable insights to help museums become more audience focused and provide clear evidence of need and demand in grant funding applications. Russell Cotes Art Gallery & Museum, Blandford Town Museum, Nothe Fort, Bridport Museum and Weymouth Museum have all benefitted from this scheme over the last year.

5.3 A number of targeted support projects have been progressed over the past year including:

- Progression of a redevelopment plan for Weymouth Museum and creation of an associated National Lottery Heritage Fund bid for £1m+
- Support for formulation and delivery of S106 projects at Shire Hall Museum and Sherborne Town Museum
- Accreditation standard work with Langton Matravers Museum, Hengistbury Head Visitor Centre and Blandford Fashion Museum
- Interpretation development work at Sherborne Steam and Waterwheel Centre
- Completion of a complete redisplay of Corfe Castle Museum, now reopened to the public
- Options development support for Swanage Museum to grow capacity for displays and facilities
- Advice and support for governance and organisational change initiatives at Keep Military Museum, Russell Cotes Art Gallery & Museum, Wareham Museum & Gillingham Museum
- Facilitation of Dorset Museums Association and North Dorset Museums networks, including delivery of an annual conference, skills sharing opportunities and group bargaining for mutual benefit schemes, such as Visit Dorset and Harwell Restoration.

5.4 In recent months, the MDO role has supported the roll-out of Dorset Council's Organisational Revenue Support Fund 2024-2027, which is a grant programme that provides core revenue support to constituted and 'not for profit' cultural organisations such as Accredited Museums, Arts & Heritage Organisations in Dorset. The fund is designed to support cultural organisations that are relevant to the communities within the Dorset Council area, inclusive of priority audiences, distinctive in their offering, and have a demonstrated impact. Grants of up to £50,000 per annum are available and funding is for a three-year period to foster sustainability. It is hoped that at least 12 Dorset museums will be supported.

6. Community Engagement

6.1 The JAS has continued its wide-ranging community engagement activity. Significant activities in 2023 include;

- Tailored support for three young volunteers with additional access requirements leading to improved prospects for education or employment.
- A one-month work experience placement for two undergraduates from Bournemouth University
- The collection and processing of oral history interviews from friends, relations and associates of Dame Elisabeth Frink
- Support and advice to a wide range of community projects including DEED's 'A Place We Can Call Home' which is recording the experiences of new arrivals in the BCP area; the Bournemouth Hebrew Congregation's memorial project; a revised version of a 1934 play about the Tolpuddle Martyrs; a new project at Talbot Village; the Royal Arcade, Boscombe development project; an interactive map for the Gypsy, Roma and traveller communities; plans for an arts installation at Dorchester Prison and an innovative dance project at Pavilion Dance South West.
- Thirty-three on site visits or off-site talks, training sessions or workshops
- Research support to Poole's first community play, 'SALT'
- Two volunteers re-engaged and one new volunteer recruited
- Contributing to Dorchester's D-Day commemoration plans
- Continued membership of the Cultural Hub for BCP

7. Records of Dorset Council and BCP Council

- 7.2 BCP Council has transferred very little physical material to DHC in the last 12 months. There remain large gaps in the corporate memory (archive). The JAS is keen to work with BCP departments to ensure that relevant material is transferred for preservation and public access.
- 7.3 On a more positive note, there have been transfers of some digital records to DHC. These include records of adopted children and material generated by Democratic Services within the Mod Gov system.

8. Digital Preservation

- 8.1 The consortium of local government archive services using Preservica digital preservation software, led by Dorset, has grown to 21 members. This means that we have achieved the maximum discount available on the annual fee for all members. 1 additional member, the Tank Museum is due to join in early 2024.
- 8.2 Working in collaboration with Preservica many thousands of committee records have been transferred from the Mod.Gov system of both Dorset Council and Bournemouth, Christchurch and Poole Council as well as the various predecessor councils. This is now a fully automated process requiring little human intervention and ensures these records are properly preserved and will be available for future generations.³ By assisting with the development of this tool, the JAS has gained access to it for free, saving the service a £1,000 licence annual fee. Committee records that are confidential and closed for a defined period have yet to be addressed.

³ Available to view here: [Councils and Committees | Dorset History Centre Digital Archive \(preservica.com\)](https://councils-and-committees.dorset-history-centre-digital-archive.preservica.com)

- 8.3 The JAS continues to work with a multitude of individuals and organisations to advise and offer digital preservation for important cultural records. Recent accessions have included material related to quarrying on Portland; the history of the lerret (a boat native to Lyme Bay); church furnishings; and oral histories collected by several Dorset museums.
- 8.4 The digitisation of multimedia formats is increasingly urgent as the people with the expertise and equipment to transfer original formats to digital is rapidly shrinking. In March 2023 over 120 items of at-risk video and film were digitised. These are currently being ingested into Preservica, and metadata added to the catalogue. Generous funding from Dorset Archives Trust will allow more of this vulnerable media to be digitised by the end of 2023.

9. Conservation

- 9.1 Key outcomes of the work of the JAS's Conservation Officer were:
- The post of Archive Conservation Officer was vacant between Aug and Nov 2022, with the new conservator being appointed in November 2022.
 - Work is on-going on the Dorset Authors conservation project funded by the National Manuscript Conservation Trust, with an estimated completion date of Dec.23
 - Completion of phase 1 of the Railway Plans conservation and digitisation project, providing digital access to damaged and inaccessible documents.
 - A grant of £3.8K has been given for phase 2 of the Railway Plans conservation and digitisation project. Work will begin before the end of the year.
 - Provided conservation support to local museums such as Bridport Museum and Sherborne Museum.
 - Continuing work for external clients, including the Tank Museum and Nothe Fort.
 - Collaborating with Dorset Museum on the upcoming exhibition, *Elisabeth Frink: A View from Within* to loan material from the Frink archive, including photographs, maquettes, and original paintings.
 - Working in partnership with Wimborne Cathedral to display the Wimborne Manor Court Book in the Chained Library. The Manor court book has proved extremely popular, with over 7,000 visitor this season.

10. Collections Management

- 10.1 The JAS continues to receive regular, significant accessions of hard copy archives. Since the last update to the Board, the most notable recent material to be deposited includes:
- Bournemouth Transport Limited (Yellow Buses) archives
 - Wessex Water archives
 - Edward Thomas Percy Sherborne and environs map
 - Papers of John Llewelin – 1st Baron Llewelin of Upton Park
 - Dorset Railway Stations Improvement plans and terrier
- 10.2 The archives of the former Bournemouth Transport Ltd. (Yellow Buses) were acquired in November 2022. A legal agreement transferring ownership of the

archive was signed and a notional £1.00 payment made to secure the collection. An application to gain funding from The Business Archives Council to support the cataloguing of these archives was unsuccessful. This was disappointing although on a more positive note, the service has been encouraged to re-apply in 2024.

- 10.3 An application to gain £35,000 funding from The National Archives to support the cataloguing of the archives of Thomas Hardy was successful. Competition for this funding was intense. A total of £68,000 is required to undertake the project. A public fundraising campaign undertaken with support from Dorset Museum, the Thomas Hardy Society and Dorset Archives Trust has so far managed to raise a total of £55,000 leaving us £13,000 short of our total. The challenge to raise the remainder of funds therefore remains although it is important that this most significant of archives is made properly available to the wider world.
- 10.4 This situation underlines the difficulty local authority services face in acquiring funding for cataloguing of archives, which is one of the core functions of the JAS. Very few opportunities exist to gain additional resourcing to catalogue archives and the environment is becoming increasingly competitive.

11. Proposed closure period

- 11.1 Many archive services (most in the South-West) operate a 'closure period' – that is, a period of time when the service is closed to the public specifically to allow staff to concentrate on addressing tasks which cannot be done any other time. These primarily relate to the collections – e.g. to backlogs of material that requires sorting, ordering and structuring in order to make it publicly accessible. The JAS has significant backlogs that have built up over a period of years. It is proposed that the JAS conducts a two week closure period in January 2024. January is the quietest month for the service in terms of public visits so would provide the minimum inconvenience for users. Staff leave would be minimised in order to ensure that the most effective use of the closure was made.
- 11.2 The benefits of a closure period include:
- The ability to identify additional space within repositories by sorting and consolidating material;
 - Better management of collections, so improving the accessibility of material by the public.
 - The removal of duplicate material (e.g. Ordnance Survey mapping) which can be disposed of.
- 11.3 Public enquiries and any urgent official requests for information would still be responded to and should permission be given to undertake a closure period, it would be widely advertised so as to alert anyone planning to come to DHC of the situation.

12. Conclusion

- 12.1 The JAS has reviewed and refined its strategic priorities in its 2021-26 service plan. The JAS continues to work hard to deliver the service plan priorities and to

balance its commitments and aspirations against the funding provided by the two councils as well as externally-generated income. Once the position in relation to the future of archive storage is known, the service can dedicate time to either a capital scheme on-site or to pursuing other collections-related projects.

Sam Johnston
Service Manager for Archives and Records

1. Financial Implications

All activities described in this report are covered by either the JAS revenue budget, reserve or an externally-sourced grant.

2. Natural Environment, Climate & Ecology Implications

DHC has significantly improved its energy performance through a major project to reduce consumption whilst ensuring the maintenance of high-quality environmental controls. This, combined with the generation of solar energy through PV panels on roof elevations has rendered the building highly energy-efficient.

3. Well-being and Health Implications

The JAS contributes to wellbeing outcomes for both councils and improving the quality of life for residents of BCP and Dorset Council areas and attracting visitors to the county lie at the heart of its work.

4. Other Implications

None

5. Risk Assessment

5.1 HAVING CONSIDERED: the risks associated with this decision; the level of risk has been identified as:

Current Risk: Low

Residual Risk: Low

6. Equalities Impact Assessment

The JAS has recently reviewed and updated a full EQIA. Areas for further consideration include working with younger people and with black and ethnic minority groups and

religious minorities. Improved digital provision will also assist in providing greater access to collections for people living at some distance from Dorchester.

7. Appendices

Appendix 1: Joint Archives Service Plan 2021-26

Appendix 2: Joint Archives Service Strategic Risk Register

8. Background Papers

- Public Service Quality Group statistics 2023
- JAS accession records, service statistics and records.
- Accreditation data, 2021
- Archives Unlocked, The National Archives, 2020
- JAS policies, revised 2023
- Previous reports to the JAAB

Joint Archives Service

Service Development Plan

2021-2026

DORSET
HISTORY CENTRE

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1

SERVICE DESCRIPTION

The Joint Archives Service (JAS), based at Dorset History Centre (DHC), is operated on behalf of Bournemouth, Christchurch and Poole (BCP) Council and Dorset Council. Partnership between the two authorities as delivered through the joint service sits at the heart of JAS activities and underwrites all aspects of its operation as detailed in the service plan.

The JAS is the county's only accredited archive service as designated by The National Archives. Records Management and Local Studies Library services are operated on behalf of Dorset Council via separate budgets.

PURPOSE

The Service Development Plan will:

- Articulate the JAS's ambition to excel in its role as custodian of the county's physical and digital archives and records
- Clarify the core functions or 'business as usual' activities of the JAS
- Describe planned projects and/or workstreams over the period 2021-26
- Demonstrate how the service contributes towards the corporate outcomes of the two funding authorities
- Provide key information about the service to enable evaluation and analysis of its performance
- Build on the analysis and recommendations of consultancy report A [Review of the Dorset Joint Archives Service](#) by Elizabeth Oxborrow-Cowan and Associates (February 2021)
- Be regularly updated to reflect the current status of particular activities.

2

VISION, MISSION, & GOALS

OUR VISION

The archival heritage and authentic record of Bournemouth, Christchurch, Dorset and Poole will be preserved by the Joint Archives Service and used to inform, educate and inspire our communities through collaboration and innovation.



OUR MISSION

To acquire, preserve and make accessible the archives of Bournemouth, Christchurch, Dorset and Poole and so promote cultural, economic, educational and social well-being; to act as the corporate memory for the two funding bodies.



OUR GOALS

We will:

- Be an open and innovative organisation, known and trusted by all
- Lead in developing systems and services which enhance the management and care of archives, records and local studies materials
- Increase the use of and access to archives and other heritage assets through a wide range of digital and public engagement activities
- Constantly improve what we do through partnership and collaboration
- Actively promote equality of access to services and the diversity of collections held by the JAS.



3

KEY PRIORITIES

The key priorities of the JAS are to:

- 1** Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve, conserve and promote access to them to optimum effect
- 2** Design and deliver digital preservation services across both authority areas
- 3** Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities
- 4** Engage a wide variety of audiences with digital and physical resources and events, recognising barriers to involvement and working actively to dismantle these
- 5** Encourage and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work
- 6** Develop and maintain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver positive outcomes and mutual benefits to all parties
- 7** Efficiently manage and enhance the DHC building including the provision of sufficient long-term archival storage space, so increasing value for money for customers, collections and staff

Selected corporate priorities of the funding authorities to whose outcomes the JAS contributes:

BCP Council – Draft Vision, Priorities and Objectives (2023):

- People and Communities
- Place and Environment

Dorset Council – Council Plan (2020-24):

- Unique environment
- Strong, healthy communities
- Staying safe and well
- Economic development



4

ACTION PLAN

Red Amber Green (RAG) Summary

The total number of workstreams within the current review period of the Service Development Plan is:

Red	1
Amber	3
Green	17
Total	21

For ease of comprehension the JAS's **business as usual** activities are listed adjacent to the workstream with which they have the most affinity.

KEY

Symbols used:	
✓	Completed
G	On track
A	Some minor slippage
R	Delays/ Serious Problems/ Not being Achieved
DF	Deferred



Officers involved in specific workstreams:	
SJ	Sam Johnston, Service Manager for Archives and Records
JH	Jacqui Halewood, Principal Archivist
OS	Owen Simons, Archivist (Collections)
CP	Cassandra Pickavance, Archivist (Digital Preservation)
JP	Archive Conservation Officer – Jess Pollard
LD	Luke Dady, Archivist (Public Services)
MG	Maria Gayton, Community Engagement Officer



Service Development Plan: workstreams and projects

Priority 1: Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve and conserve them to optimum effect;

Business as usual activities:

- Acquisition, appraisal, accessioning, and limited cataloguing of Council, business and community-generated archival material, both hard copy and digital
- Proactive acquisition of Public Records
- Preservation management of collections within passively managed and [environmentally controlled repositories](#)
- Repair and conservation of documents from DHC's own collections as well as via private commissions
-



	Workstream/Project	Lead	Outcome/Target	Timeframe	Current progress	Rag Status
1.1	Targeted acquisition of archives especially from a range of sources identified through gap analysis.	SJ/ OS	<ul style="list-style-type: none"> • Building up the collection in areas of identified weakness within the DHC holdings. • To better reflect the communities of Dorset and BCP council area. • Adding to the publicly accessible cultural heritage of the county for research on the heritage of the county. • Particular focus on business and artistic archives. 	Ongoing	<ul style="list-style-type: none"> • Discussions regarding a gap analysis of the DHC current holdings. Part of capital project build-up • Likely to require extra staff capacity or Community Engagement projects to successfully acquire collections from some communities. • Depositors strongly encouraged to help fund costs of archive storage. • Need to develop better systems to acquire BCP corporate archives in the absence of an RM service. 	
1.2	Selected purchase of documents (auction etc) using the DAT purchase fund	SJ	Acquiring for public ownership items that would otherwise be sold privately.	Ongoing steady stream of material acquired.	Steady stream of purchases assisted by Dorset Archives Trust https://www.dorsetarchivetrust.org/archives/document-purchases	

	Workstream/Project	Lead	Outcome/Target	Timeframe	• Current progress	Rag Status
1.3	Externally funded document preservation and conservation.	JP	Rendering damaged/unusable documents available for digitisation and public access via projects.	Ongoing – as and when opportunities arise	<ul style="list-style-type: none"> • New conservator has been with the service since Autumn 2022. • Successful application to NMCT (£15k grant to work on Dorset Authors). Nearly complete • £21k grant to work on railway plans. 	
1.4	Transfer archival content on obsolete and at-risk audio-visual formats and removable digital media to digital preservation system	CP	At risk archives are preserved and remain accessible	By December 2023	Work underway to transfer removable digital media to Preservica. Significant portion of audio-visual formats digitised in 2023.. Likely to require resource to transfer remaining audio-visual formats. Potential regional sound digitisation project in development to which the JAS will contribute content.	

Priority 2: Design and deliver digital preservation services across both authority areas

Business as usual activities:

- Raising awareness of digital preservation and offering advice and support to stakeholders generating and transferring digital archives.
- Proactive acquisition of council-generated hard copy and digital records in close collaboration with records management colleagues in both funding councils

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
2.1	<p>Fully resourced JAS digital preservation strategy resulting in robust digital continuity for JAS and its clients:</p> <p>http://www.nationalarchives.gov.uk/documents/information-management/understanding-digital-continuity.pdf</p> <p><i>See consultancy report chapter 3</i></p>	CP/SJ	<ul style="list-style-type: none"> • Ensure the accessibility of digital content now and in the future. • Reduction in risk and guarantor of the councils' corporate memories • Collaborative opportunities with other local authorities. • Work with IT and records management colleagues over electronic records management and systems integration. • Preservation of cultural heritage of the county. • Protect investment in digitisation by preserving digital surrogates. 	Ongoing	<ul style="list-style-type: none"> • Longstanding use of Preservica software, now integrated with Epexio re: public access. • Significant ingest of both BCP and Dorset Council records include committee records from Modern.Gov system and adoption records from both councils. • Growing skills base within JAS team. • Resourcing challenges as workload in this area grows. • Much work to be done to align proprietary systems (e.g. Planning) with Preservica. 	
2.2	<p>Local authority consortium using Preservica software. Led by DHC, now includes 21 members in a new 5-year contract (to May 2027).</p>	SJ/CP	<p>To deliver cheapest possible price for access to digital preservation software and to share skills and knowledge.</p>	April 2019-present.	<ul style="list-style-type: none"> • Optimum number of members have joined to maximise financial benefits. • Professional network of Preservica users led by DHC is valued and engaged with 	

Priority 3: Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities;

Business as usual activities:

- High quality provision of access to original archives and local studies material on-site at DHC
- Processing of enquiries from members of the public relating to a wide variety of subject matter
- Selective digitisation of archival material to enhance access to DHC-held collections and by private commission




	Workstream/Project	Lead	Outcome(s)	Timeframe	Current Progress	RAG status
3.1	Participation in Public Services Quality surveys of archive services	LD	Score of at least 90% 'satisfied' or 'very satisfied'	2024 (biennial)	There was a Survey of Visitors in 2022, DHC rated an average 9.4/10 by visitors. Between October and December 2023 DHC will be undertaking a Distance User Survey and results from this will be available in early 2024.	G
3.2	Archive Accreditation	SJ/AI I	Meet the standard set by The National Archives covering wide range of service activities and functions	Next full accreditation review in 2023	Service successfully accredited in 2018. Service successfully re-accredited in Oct 2021 following 'light touch review'. Full re-accreditation submission in November 2023.	G
3.3	Continue to develop Epexio archive catalogue and its links to Preservica together with public front end. <i>See consultancy report chapter 4</i>	JH/ LD/C P/OS	To increase the quality and varied means of access to a greater quantity of DHC-collections online. More publicly available collections-related data, including access to digital material through Preservica. (See also Priority 2)	Business as Usual	Continue on-site volunteering to enhance catalogue. Remote volunteering via Epexio improves quality of customer access to collections and offers wider volunteering experience. Further functionality development: <ul style="list-style-type: none"> • Provide paid for access to digital archives • Document ordering • Geolocation of collections to facilitate map based searching • 	G

3.4	<p>Further investigate development of online mapping resource such as Know Your Place or similar working with Historic Environment Service (now integrated into the Archives and Records Service).</p> <p><i>See consultancy report chapter 4</i></p>	JH/ LD	<p>Enhanced access to collections. Potential to link to other SW resources</p>	<p>We hope that this will form part of the capital project delivery.</p>	<p>Potential to form part of NLHF-funded capital project public engagement programme or to be actioned as a standalone project for which external funding could be sought. Preliminary research has been undertaken</p>	A
3.5	<p>2 members of JAS staff will be developed via the Level 7 Apprenticeship (3 years) funded through the Apprenticeship Levy.</p>	LD	<p>Staff development and professional progression via national scheme (led by The National Archives).</p>	<p>2023-2026</p>	<p>Will reduce capacity within the public service team due to 1 day per week study implications. SW cohort including a member of DC's Records Management team. Starts October 2023</p>	G



Priority 4: Work with a wide variety of audiences and through public engagement and advocacy to raise the profile of DHC, to encourage access to and appreciation of the archival resource;

Business as usual activities:




- Delivery of outreach services including talks, project design, workshops, tours and engagement with stakeholders, educational institutions and community groups
- Provision of digital services including the online catalogue, website, social media, blogs and material hosted by Ancestry.co.uk

	Workstream/Project	Lead	Outcome(s)	Timeframe	Progress	RAG status
4.1	Continue to work with the Cultural Hub and the Cultural Education Partnership	JH/ MG	To identify opportunities to work with BCP schools, other cultural providers and creatives to develop stimulating resources for engagement with archives in educational settings.	Ongoing	Innovative mixed media resource developed and delivered Contributions to schools' 'artist in residence projects'	
4.2	Community engagement - support and facilitation for a range of externally-resourced groups and projects to enhance access to and enjoyment of archival heritage.	MG	Positive engagement with a range of groups and subject matter. Value of archives as source material for a wide span of uses.	Ongoing – ad hoc Ongoing – ad hoc and subject to individual project schedules	Groups include: <ul style="list-style-type: none"> • My Creative Life • Telephone Friendship Group • Valise Noire • Gypsy, Romany, Traveller (Kushti Bok) • Bridport Arts; Poole Lighthouse 	
4.3	Digital promotion, advocacy and outreach, through a range of social media platforms and DHC presence on DC & BCP corporate websites and intranets– Digital Development Group <i>See consultancy report chapters 3 & 4</i>	LD/JH	<ul style="list-style-type: none"> • Raise the profile of DHC to customers and stakeholders • Provide detailed information on DHC and first point of contact • Attract new audiences • Help to sell services and generate income. • A Digital Development Strategy 	Ongoing – Digital Development Strategy by the end of 2022	Work has been slowed due to the pressure of other demands. It still remains an aspiration.	

Priority 5: Increase and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work;

	Workstream/Project	Lead	Outcome(s)	Timeframe	Progress	RAG status
5.1	Developing a strong on-site and remote volunteer programme. <i>See consultancy report chapter 3</i>	OS/JP/ MG/LD /CP	<ul style="list-style-type: none"> Delivering critical 'added value' capacity, sorting, repackaging, listing collections and for Community Engagement projects Involving the community in the life of DHC and its collections. Includes work experience opportunities for young people. Wider range of projects for volunteers to engage with (digitisation, research, oral history, conservation, cataloguing, collections indexing). 	Ongoing and review annually	<ul style="list-style-type: none"> Remote volunteering opportunities delivered via Epexio, e.g. geo-tagging. Service is reorganising and re-focusing its volunteering offer and programme post-Covid and in the light of technological change. Maintain standards gained through Investors in Volunteers. Volunteering numbers have recovered post-Covid. 	
5.2	Dorset Archives Trust (DAT) www.dorsetarchivestrust.org	SJ/JH	<p>Mobilising the effective support of DAT for DHC projects through its 3 key priorities:</p> <ul style="list-style-type: none"> Fundraising Collections development Advocacy 	Ongoing annual review Annual review prior to AGM	Membership steadily increasing. Events programme based around archive collections. Crowdfunding for Hardy archive project. Successful funding bids on behalf of DHC priority projects will be important in terms of fundraising in the event of a capital project.	

Priority 6: Develop and sustain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver mutual benefits;

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
6.1	Seek external funding for collections related projects including cataloguing, conservation and selective digitisation	SJ/JH	<ul style="list-style-type: none"> • Make large quantities of new material available to the public. • Assist preservation through digital facsimiles; • Increase the JAS's online presence via catalogue and other digital tools. • Complement scarce core resources. 	Ongoing, but subject to available funding opportunities and programmes	<p>Reliant upon opportunities to seek funding through either public or private sources.</p> <p>Collections requiring investment include:</p> <ul style="list-style-type: none"> • Wessex Water • Quarter Sessions • 'Dorset Authors' (Hardy, Barnes, Townsend Warner) • Records of local government and predecessor councils 	
6.2	Archives South West – regional head of repository group working on strategic areas of mutual interest.	SJ/CP	<ul style="list-style-type: none"> • Share knowledge and skills • Promote archival best practice • Partnership fundraising opportunities 	Ongoing – project based activity subject to funding	Several successful joint projects including analysis of newspaper digitisation and a planned major bid to NLHF entitled 'Saving South West Sounds'.	
6.3	Investigate partnerships with academic institutions to better exploit DHC-held collections and encourage student and academic interest in archives.	SJ/OS/JH	<ul style="list-style-type: none"> • Strong links to regional HE institutions • Possible collaborative projects • Opens up new potential sources of funding through external grants. 	Ongoing; annual review of MoUs and project opportunities via academic departments.	<p>Positive activities:</p> <ol style="list-style-type: none"> Building relationship via MoU with Bournemouth University through the capital scheme and library services. Links with AUB re: Poole Pottery and Frink archives Opportunities emerging with BU and its BA in Public History – work experience and extended project placements. MoU signed in 2020 with University of Exeter. Student travel fund (DAT). 	

Priority 7: Efficiently manage and enhance the DHC building including the provision of sufficient long-term archival storage space, so increasing value for money for customers, collections and staff;

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
7.1	Capital project; extension of DHC building to ensure adequate future space for collections. <i>See consultancy report chapter 6</i>	All	<ul style="list-style-type: none"> • Ensure appropriate storage is available for the next 25-30 years of hard copy archive acquisition. • Ensure that the best value 'full life' solution is agreed. • Wide programme of public and community engagement across the county (if NLHF-funded). • Improve public access to the building 	EoI approved by NLHF in May 2022. New EoI required due to expiry of submission window.	<ul style="list-style-type: none"> • 'Light touch' review of options appraisal (2013) to confirm best solution for additional accommodation (May 2021). Further options appraisal in May 2023 • Currently awaiting a decision from the two funding councils. 	R
7.2	Take part in Dorset Council energy efficiency initiatives and projects. Pursue the improvement of the fabric of the DHC building	SJ/JH	To improve fabric and energy consumption in DHC building – (heat pump and low energy lighting, roof and facias and soffits, lift)	2022	<ul style="list-style-type: none"> • DC has been awarded funding for improved energy efficiency projects. • New PV solar arrays added to DHC roof summer 2022. 	G

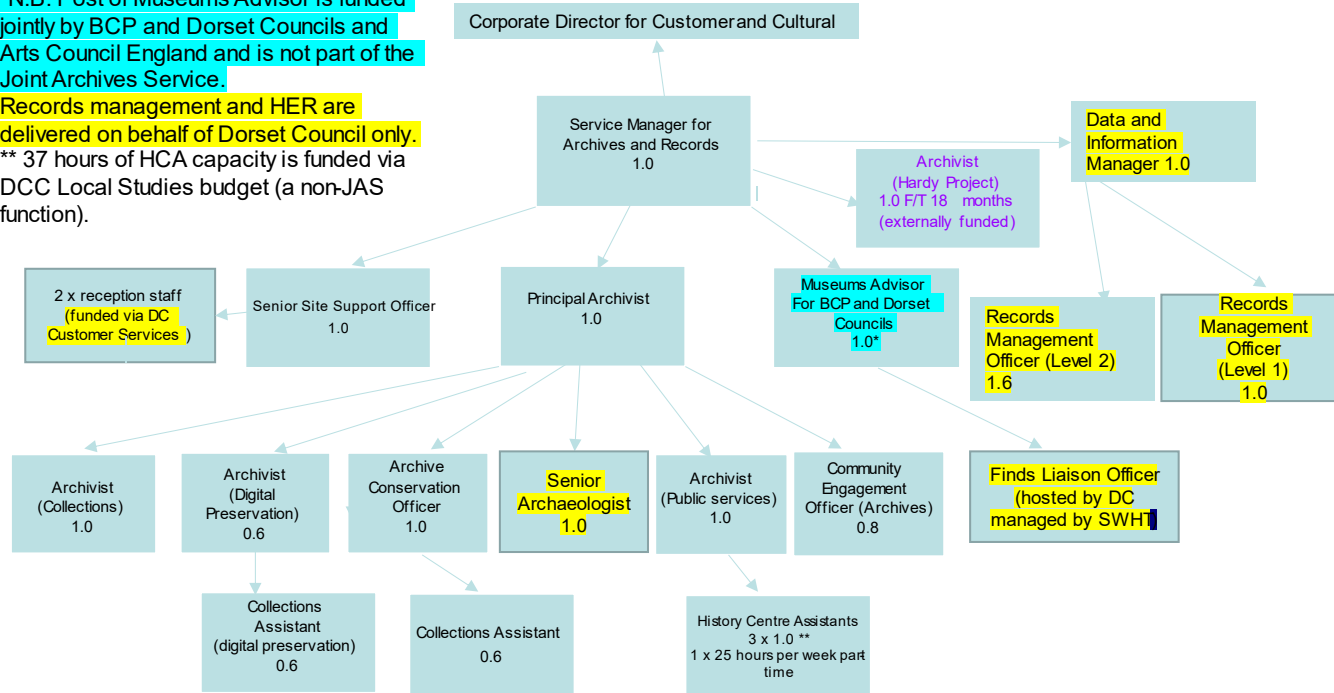
5. Service structure

Archives and Records Service Structure September 2023

*N.B. Post of Museums Advisor is funded jointly by BCP and Dorset Councils and Arts Council England and is not part of the Joint Archives Service.

Records management and HER are delivered on behalf of Dorset Council only.

** 37 hours of HCA capacity is funded via DCC Local Studies budget (a non-JAS function).



5. Risk Register

September 2023
Archives Service Strategic Funding
(Risks have been listed in order of severity)

Risk Scoring	Impact	H	6	8	9
L = Low		M	3	5	7
M = Medium		L	1	2	4
H - High			L	M	H
			Probability		

Risk No.	Risk Description	Likely Impact if Risk Occurs	Impact H/M/L	Probability H/M/L	Score	Counter Measures	Comment
1	Core Funding: continued risk to local government funding from 2024/25. This will need to be factored into the JAS's ability to maintain current levels of service delivery.	Further reductions in standards, levels and capacity of services offered by JAS - potentially taking it below the minimal effective level through the loss of distinct functions	H	H	9	Consultants' report indicates few obvious additional sources of revenue not already accessed. Ensure understanding of value for money through benchmarking and TNA Accreditation. Importance of digital preservation in supporting business continuity and will require increased resourcing in the future.	Standstill budgets in 7 of 9 years. Inflationary pressure specifically from national pay agreement and business rates rise. Important to gauge the views of the two unitary councils on the role and priorities

2	Failure to develop preferred option	Finite and diminishing space within	H	H	9	Discussions between BCP and DC to establish	Project will be pursued once
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	to provide extra space for JAS collections	repositories. DHC would, in time, have to start refusing material. Failure to preserve corporate memory or Dorset's heritage. Potential revenue cost implication if space has to be rented.				the terms on which a capital project might be undertaken. Full life cost of DHC extension is the cheapest solution. External storage would be much more expensive in the long term.	clear trajectory is established.
3	Funding for digital preservation is not continued and work concludes without long-term sustainable solution.	Failure to provide digital preservation services for funding authorities and wider community. Information loss and/or data corruption. Potential legal implications.	H	M	7	Prove the long-term benefits of digital preservation and the risks and consequences of not having such a system. DC finance in place until 2021. Consortium model has halved costs to each member. Need BCP Council to adopt digital preservation via Preservica.	<ul style="list-style-type: none"> The JAS is leading the local authority sector in working on digital preservation. Information loss/corruption is a major risk to the corporate memory of both authorities. Evidence of growing understanding of digital preservation and its benefits.
4	Dorset Archives Trust: failure to sustain Dorset Archives Trust due to lack of external interest and low capacity to support from within DHC.	No revenue impact; loss of support in communities, harm to reputation and loss of potential for special projects and funding to benefit Dorset's archives.	M	L	3	<ul style="list-style-type: none"> Cultivate new trustees to strengthen body. Ensure alignment of DHC activities and those of DAT. 	Body increasing in confidence and understanding. Very positive results in terms of fundraising.